
Montana State Library

RFI: Downloadable e-Content Services
July 24, 2007

Executive Overview

OCLC is pleased to offer the Montana State Library our NetLibrary eAudiobooks service. Through partnerships with Recorded Books, Blackstone Audio, Random House, and other leading publishers, NetLibrary's eAudiobook collections feature over 4,700 titles -- with new titles added monthly. NetLibrary eAudiobooks from OCLC will help meet the wide range of leisure reading, research, classroom instruction, and independent learning needs of Montana's citizens.

We presently offer two options for accessing NetLibrary's best-selling eAudiobook titles from the world's leading publishers through easy-to-use, single-platform functionality:

Our *Subscription Program* option features:

- Automatic renewals
- Simplified annual subscription
- New titles added monthly at no additional charge
- Administrative tools for libraries, including usage reports

Our eAudiobook *Purchase Program* enables each Montana library and/or groups of libraries to purchase individual titles at any time. The NetLibrary platform's Administrative tools, including usage reports, are also available through for purchased titles.

By selecting OCLC's NetLibrary service, the Montana State Library will leverage its important role and long-standing investment in OCLC while providing patrons with access to these valuable resources by means of multiple routes unique to OCLC:

- Montana Library Network Catalog
- WorldCat on FirstSearch
- Open WorldCat
- worldcat.org
- netlibrary.org

Moreover, Montana's participation in the ground-breaking OCLC resource sharing service pilot for delivery of materials to home and office will be complemented by statewide access to NetLibrary eAudiobooks.

We believe this unique combination of resources will add significant value for Montana's citizens. Our high-quality resources will serve all Montana residents and enrich the quality of their lives, enhance their learning experiences, and accelerate economic growth in their communities.

About OCLC

NetLibrary is a wholly owned division of OCLC Online Computer Library Center, Inc. OCLC, a nonprofit organization incorporated in Ohio in 1967, has provided computer-based cataloging, reference, resource sharing, and preservation services to 56,532 libraries in 111 countries and territories. OCLC's mission is to improve access to the world's information and to reduce the costs of that information. To support this mission, OCLC conducts ongoing research to help provide libraries with state-of-the-art solutions to their information needs.

In addition to the eAudiobooks OCLC is offering for Montana's libraries, OCLC provides solutions for the following areas of the library: Cataloging and metadata, collection management, digitization and preservation, reference, and resource sharing. Individually, our solutions create tangible benefits for nearly every aspect of library management. Combined, they offer unparalleled efficiencies, economy, and a quality of service that brings patrons back again and again.

Conclusion

OCLC appreciates the opportunity to participate in this important RFI. We look forward to expanding our partnership with the Montana State Library and Montana libraries.

2.0 Project Description

Participating libraries serve a wide variety of patrons with differing demands for e-content service and delivery. This project will meet those varying needs. These services will be made available to multi-type libraries (public, academic, school and special libraries) through a statewide subscription.

2.1 Provide a detailed description of your collections. Describe your collection management tools available to libraries.

OCLC NetLibrary offers two eAudiobook programs: a *Subscription* Program and a *Purchase* Program. Each is described in detail below.

The Subscription Program

OCLC in partnership with Recorded Books, the world's largest independent publisher and distributor of unabridged audiobooks, offers an eAudiobook Subscription Program to the Montana State Library with more than 2,000 titles.

We suggest two Recorded Books eAudiobook collections: *Core* and *Children's & Young Adult*. The *Core Collection* features a growing list of the latest bestsellers, book club favorites, award-winning authors, and timeless classics. Ideal for public libraries, the *Children's & Young Adult Collection* includes Newbery, Caldecott, and other award winners as well as time-tested classics, multicultural titles, popular themes, and bestselling children's and young adult author series.

OCLC's NetLibrary eAudiobook subscription service automatically adds about 30 titles per month to the Core Collection and 10 titles per month to the Children's & Young Adult Collection. NetLibrary manages new titles as they are added and assigns them to the appropriate subject category. This process automatically updates the titles available to patrons, requiring no ongoing collection-development activities on the part of libraries.

For complete title lists, please see Attachment 1 or these links: [eAudiobooks Core Collection](#) and [Children's and Young Adult Collection](#).

In addition to the Core Collection and Children's & Young Adult Collection, please note that *eAudioEssentials*, *Pimsleur*, and *the Holy Bible* will be included at no additional charge. These valuable resources offer the following:

- NetLibrary *eAudioEssentials* presents classic fiction with titles from Dickens, Joyce, Melville, Dostoyevsky, and many more. For a complete title list, please see Attachment 1 or this link: [eAudiobooks Essentials Collection](#)
- The *Pimsleur Language Series* provides easy-to-understand lessons covering 39 languages for beginners, intermediate-level speakers, and ESL students. For a complete title list, please see Attachment 1 or this link: [Pimsleur Language Series Collection](#).
- The most authentic unabridged translation ever produced, the *CEV Holy Bible* eAudiobook set offers a faithful and uncompromising translation of the original Greek and Hebrew manuscripts, making it an essential resource for any library. For a complete title list, please see Attachment 1 or this link: [CEV Holy Bible Collection](#)

The complete NetLibrary subscription title list is available in Attachment 1 and at: <http://library.netlibrary.com/Audiobooksubscription.aspx>

With our convenient annual subscription program, MSL would pay one price for all titles included in the collection and a block of checkouts matched to your libraries' circulation trends or populations served.

To quote Subscription Program pricing, NetLibrary will need the following statistic for each library in your group:

- Public Libraries: Most recent annual circulation
- Academic: Full-time equivalent (FTE) student enrollment
- School: Student enrollment
- Special Libraries: Number of full-time employees

The Purchase Program

OCLC NetLibrary also offers nearly 2,000 titles as part of its eAudiobook Purchase Program. Individual Montana libraries and/or groups of libraries may purchase titles through this program at any time. These titles are available on a one-title/one-user basis, although libraries may buy additional copies of popular titles to minimize the need for waitlists. As summarized below, seven publishers currently participate in this program, with many more expected, making this option highly flexible for meeting each library's collection-development needs:

Blackstone Audio

Blackstone Audio offers best-selling contemporary and classic fiction, page-turning mysteries, movie tie-ins, science fiction, children's literature, and much more from the most celebrated authors. With hundreds of unabridged titles to choose from, patrons will enjoy perennial bestsellers such as *1984* by George Orwell, *Atlas Shrugged* by Ayn Rand, and the *Aubrey/Maturin Series* by Patrick O'Brien. Also included are award-winning releases such as *The Secret River* by Kate Grenville, *The Master* by Colm Tóibín, and winner of the 2005 Audie Award for Best Drama, *The Sherlock Holmes Theatre*.

Books In Motion

Mysteries, action adventures, romances, historical fiction, classics, science fiction & fantasy, Christian fiction, Westerns, and selected non-fiction are brought to life by Books in Motion productions. Notable authors include Judith Jance, Terry Brooks, and Gilbert Morris.

L.A. Theater Works

Known for their use of well-known actors to perform classic and contemporary plays, LA Theater Works feature playwrights such as Oscar Wilde, George Bernard Shaw, Noel Coward, and William Shakespeare.

Listen & Live

Listen & Live Audio features popular public and K-12 audio titles such as *The Darwin Awards*, *The Worst-Case Scenario Survival Handbook*, and *The Tales of Uncle Remus*. The company is a long-standing resource for thousands of libraries across the country, including Arapahoe (CO) Library System, Los Angeles City Library System, and Los Angeles County Library System.

Live Oak Media

Live Oak Media has a 25-year tradition of producing read-along recordings of classic and award-winning children's literature for the school and library market. Live Oak has established new genres, such as *Live Oak Mysteries* (ages 8-12) and *Readalongs for Beginning Readers* (ages 5-8). They have launched an innovative imprint, Live Oak Music Makers, that features recordings of picture books with strong musical components, weaving words, images, and music to create a new, meaningful reading and listening experience. Other notable examples include the *Sammy Keyes* series and *I Thought My Soul Would Rise and Fly*.

Random House

Random House, Inc., the world's largest English-language general trade book publisher, comprises many fiction and nonfiction publishing groups. They produce eAudiobook titles from both original imprints and reprints by some of the greatest and most popular writers of our time. NetLibrary offers eAudiobooks from three Random House groups:

- Living Language
Living Language is the foremost name in foreign language self-study. Since 1946, millions have learned to speak, read, and write a new language with Living Language courses. Originally developed by U.S. government experts for overseas-bound service personnel and diplomats, the Living Language line now includes books, cassettes, CDs, and digital content in 20 different languages.
- Listening Library
Listening Library offers the children's imprints of Random House, Inc., the U.S. division of Random House, the world's largest trade book publisher.
- Books on Tape
The Books on Tape Digital Collection offers award-winning spoken-word material, including adult unabridged fiction, mystery and nonfiction. Their hundreds of unabridged titles present new releases such as *The Life and Times of the Thunderbolt Kid: A Memoir* by Bill Bryson, *Thirteen Moons* by Charles Frazier, and *The Innocent Man: Murder and Injustice in a Small Town* by John Grisham. Perennial bestsellers include works by Tom Clancy, E.L. Doctorow, and Sue Grafton. Award-winning and classic titles feature ALA Notable Adult Books, AudioFile Earphones Award winners, and *New York Times* bestsellers.

YoYo USA

YoYo USA publishes nearly 200 Spanish-language titles, with most being classic literature. Examples include *Vuelta al Mundo en 80 Días (Around the World in 80 Days)*, *Fantasma de la Opera (Phantom of the Opera)* and *Orgullo y Prejuicio (Pride and Prejudice)*.

Purchase Program pricing is the title's list price plus an annual access fee of 10% of the list price.

Please see our Purchase Program title list in Attachment 1 or view it by category at: <http://library.netlibrary.com/AudiobookPurchase.aspx>.

Describe your collection management tools available to libraries.

New Subscription Program titles appear in the online NetLibrary catalog, *TitleSelect*, automatically.

With the Purchase Program, library staff members browse by subject or publisher to find individual titles that best meet their collection development goals. They then place their orders via *TitleSelect*, our online catalog.

New Purchase Program titles are brought to collection-development staff's attention via the automated NetLibrary service, *TitleDirect*. *TitleDirect* facilitates the acquisition of eContent through online selection, review, and purchase. The two primary components of *TitleDirect* are:

- Each library creates a customized content profile—the areas in which the library typically collects content
- Each library's designated content selectors, reviewers, and administrators receive notification via e-mail when new content matches the library's profile

TitleDirect lets staff members determine their collection strategy once, and then the system automatically notifies them when new titles meet the library's collection-development definitions.

Usage results and trends are important aspects of collection management. Usage statistics for all titles, regardless of program, are available in our secure, online Library Resource Center. OCLC will send MSL usage statistics reports quarterly. These reports will include usage per library per month and will identify libraries that may need additional assistance to increase usage. We have performed similar analyses for other groups and understand the key factors that drive library usage.

In the sample usage report and analysis presented in Attachment 2, each library's population was identified to provide a common basis for comparison. The analysis compared usage for libraries that had and had not loaded MARC records. Usage statistics can also be analyzed relative to other factors, such as completion of training, establishing remote-patron authentication, and implementation of marketing activities.

NetLibrary usage statistics are also available online from our secure, subscribers-only web site. Reports are available at both the library and group level. Date ranges may be set as desired by the library staffer running the report. The MSL NetLibrary Administrator will be able to access participants' statistics at both the group and individual library level. Each participating library's NetLibrary Administrator can access statistics only for his or her library. For more information about the Library Resource Center, please see Attachment 3 or:

<http://www.oclc.org/services/brochures/netlibraryresourcecenter.pdf>

2.2 How is content delivered to the end-patron? Describe the usability features of your service.

NetLibrary eAudiobooks will download and play on any desktop PC or laptop running compatible media software programs and operating systems. Users may transfer eAudiobook titles to a wide range of portable devices, including portable music players and portable media centers from Archos, Creative Labs, Samsung, Toshiba and other manufacturers.

NetLibrary eAudiobooks are available through standard Web browsers, including:

- Internet Explorer 5.5 and above
- Netscape 6.2 and above
- Mozilla 1.1 and above
- Firefox 1.0 and above
- Safari 1.0 and above
- Opera 7.0 and above

To facilitate usability, your patrons can select among several interface languages:

Select your Interface Language: ?

| | | |
|-----------------------------------|----------------------------------|--------------------------------|
| English | Deutsch (German) | 日本語 (Japanese) |
| Español (Spanish) | 中文(繁體) (Chinese) | 한국어 (Korean) |
| Français (French) | 中文(简体) (Chinese) | ไทย (Thai) |

Non-English Language Support also enables patrons to conduct searches and view results for content available in their native language. Supported languages include English, French, Spanish, Chinese, Japanese, Korean, and Thai, with more languages to follow.

NetLibrary offers *Basic* and *Advanced* search modes. In *Basic Search*, NetLibrary patrons can search by full text, keyword, title, author, or subject:

In *Advanced Search*, patrons can choose among seven Search Terms -- full-text, keyword, title, author, subject, publisher, and ISBN -- to define their searches by up to four fields simultaneously:

The screenshot shows the 'Advanced Search' interface. A green header bar contains the title 'Advanced Search'. Below it, a green bar labeled 'Search Terms' is visible. The main area contains four rows of search fields. Each row has a dropdown menu for the search term, a text input field, and a dropdown for the Boolean operator. The first row is 'Title', the second is 'Author', the third is 'Keyword', and the fourth is 'Publisher'. The 'Publisher' dropdown menu is open, showing a list of options: 'Title', 'Author', 'Full-Text', 'Keyword', 'Subject', 'Publisher' (which is highlighted), and 'ISBN'. A 'Clear' button is located below the search fields. At the bottom, there is a link 'Search in Different Language' and a note 'Library (optional)' with a question mark icon.

Advanced Search supports Boolean searching in English, Spanish, French, German, and Chinese:

The screenshot shows the 'Advanced Search' interface. A green header bar contains the title 'Advanced Search'. Below it, a green bar labeled 'Search Terms' is visible. The main area contains four rows of search fields. Each row has a dropdown menu for the search term, a text input field, and a dropdown for the Boolean operator. The first row is 'Title', the second is 'Author', the third is 'Keyword', and the fourth is 'Publisher'. The Boolean operator dropdown menu for the first row is open, showing a list of options: 'And', 'And', 'Or', 'Near' (which is highlighted), and 'And'. A 'Search' button and a 'Clear' button are located below the search fields. At the bottom, there is a link 'Search in Different Language'.

Patrons may limit advanced searches by (a) year published, (b) format, (c) language, and (d) subject centers and databases:

Limit Search By (optional) ?

a. **Year Published ?**
Year:

b. **Format ?**
☐ eBooks ☐ Downloadable eBooks
☐ eJournals [Adobe® Reader® 6.0 or higher](#) is required for offline viewing.
☐ eAudiobooks

c. **eContent Language ?**

Cherokee
Chinese

d. **Subject Centers & Databases**
☐ Reference Center
☐ IT Center

Patrons using the Advanced Search *Display Options* function can prioritize display results by relevance, title, newest, or oldest:

Display Options (optional)

? Sort: Relevance

Search

Relevance
Title
Newest First
Oldest First

To view the full Advanced Search screen, please see:
<http://www.netlibrary.com/Search/AdvancedSearch.aspx>

In the results sets for both Basic and Advanced Search, the strength of each hit's match against the selected *Sort* parameter is indicated by a colored bar (a), and the search term is highlighted in the book's entry (b). The patron can begin a new Basic Search without leaving the Search Results (c), and recent searches (d) and related topics (e) are listed conveniently:

Search Results

Page: 1 2 3 4 ... Next »

Results 1 - 15 of 334 for Full-Text: **big sky country**

All (334) eBooks (334) eJournals (0) Other (0) ?

1. **Encyclopedia of Rural America: The Land and People**
by Goreham, Gary.
Publication: Santa Barbara, Calif. ABC-CLIO, 1997.
He is the author of Registered Places of Montana: **Big Sky Country** and Rock Mountain Divide: Selling and Saving the West (1993).
[View this eBook](#) | [Show Details](#) | [Add to Favorites](#)

a. → Sort by: Relevance

b. → **big sky country**

c. → Basic Search

d. → Recent Searches

e. → Related Topics

Basic Search

Full-Text
All Formats
big sky country
Search

Advanced Search
Search in Different Language

Recent Searches

[big sky country \(Full-Text\)](#)
[montana \(Full-Text\)](#)

Related Topics

- > [Geography of & travel in North America](#)
- > [American literature in](#)

Other usability features of the NetLibrary service include:

- *Spell checking* automatically examines the spelling of a query term, recognizes commonly misspelled words, and offers alternative spellings.
- NetLibrary's *search technology* keeps track of past searches during a session and enables patrons to return easily to earlier search results. Patrons can search across all NetLibrary collections simultaneously and may browse the NetLibrary title list.
- *Concept Recommendations* recognizes ambiguous search terms and provides recommendations for refining queries.
- *Search within Search* enables patrons to narrow search results by entering one or more additional search terms in order to drill down to relevant content.

NetLibrary enables patrons to read titles offline by following these simple instructions:

To Download an eAudiobook

Once you have selected an eAudiobook, you can check out and download the file to your computer:

1. From search results, click on the *Download this eAudiobook* link.
2. Select a download option: CD or radio quality.
 - Choose radio quality if you are on a dial-up connection
 - Choose CD Quality if you are on a high-speed internet connection or if you plan to transfer the eAudiobook to a portable device.
3. Select *Save* to download the file to a directory.
4. Once downloading is complete, open the eAudiobook directly from your media player or from Windows Explorer.

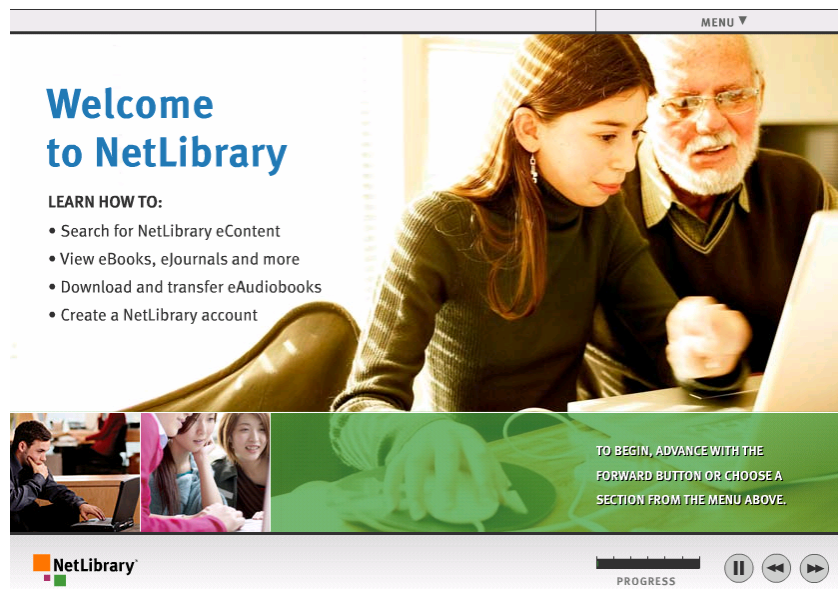
To Transfer an eAudiobook

1. Before transferring an eAudiobook to a portable device, you must open the downloaded eAudiobook file at least once on your computer.
2. Then, using your computer's media player, you can transfer the file to a portable device.
3. For more information and instructions, please see your media player's Help section or the NetLibrary *Going Portable* guide in Attachment 4 or at: www.oclc.org/brochures/goingportable.pdf .

NetLibrary eAudiobook patrons may e-mail bibliographic records by simply clicking the link entitled "Email this information." A short Web form displays, asking the patron to enter the following e-mail information: To, From, Subject, and Message.

NetLibrary patrons access online documentation through the *Help* system. Additionally, in multiple places throughout the interface, a question mark icon appears, enabling patrons to get context-sensitive help immediately.

A narrated eContent *Demo* is available in the online Help system, covering both eBooks and eAudiobooks: <http://www.oclc.org/netlibrary/demo/default.htm>



2.3 What type of training is provided?

OCLC will work with the Montana State Library to design a training program that meets MLS's needs. We offer several NetLibrary training modules, each of which can be taught on-site or delivered through virtual sessions:

- *Librarian Training*: An eAudiobooks overview that includes getting started, a demonstration, and essential resources to help your patrons use eAudiobooks.
 - Length: 90 minutes
 - Audience: Library staff with patron interaction
- *IT, Marketing, and Administration Training*: Covers five essential steps to success: Establishing Remote Patron Authentication methods, loading MARC records, marketing, downloading/ transferring an eAudiobook to a portable device, and use of the Library Resource Center.

- Length: 90 minutes
- Audience: IT, Marketing, and Administration staff
- *Optional Marketing Workshop:* An overview of the promotional tools and resources available, examples of how to use the marketing materials, and an open forum to develop a strategy to locally reach your patronage.
 - Length: 90 minutes
 - Audience: Marketing staff
- *Optional hands-on "Going Portable" Workshop:* Hands-on downloading and transferring an eAudiobook to an MP3 player. Recommended requirements: Windows XP OS with the ability to download files from the internet and save them to the desktop, Windows Media Player v10, and the ability to connect various MP3 players to the PC or Laptop and transfer files to them.
 - Length: 60 minutes
 - Audience: All staff

We will work with you and your participating libraries to customize content and schedule a delivery timeframe that best meets your statewide needs.

For a sample of our training materials, please see Attachment 5:
<http://support.oclc.org/resolutions/exampleeAB.ppt>.

In addition to delivering training, our experience with assisting other large group and statewide NetLibrary clients identified several key activities that are critical to a successful implementation:

- *Establish Remote Patron Authentication method* - Our recommendation for libraries without the ability to offer a remote patron authentication method is to direct patrons to the Montana Library Network portal (<http://montanalibraries.org/>) to access NetLibrary remotely. Once patrons login to the Montana Library Network portal and select the NetLibrary resource link, they can select their library jurisdiction or individual library name from a drop-down list. This will affiliate patrons with their correct library e-Content collection, and they can easily create their NetLibrary accounts remotely. Please see these sites for implementation examples:
 - <http://www.nclive.org/authhome.phtml>
 - http://pioneer.utah.gov/audio_books/index.html

Each library can provide its own authentication method or a combination of both. Our Implementation Specialist can assist the library(s) in finding the best authentication method for a given situation. MSL or the individual libraries are responsible for providing the remote patron authentication method. For more

information on NetLibrary authentication, please see the *Access from Anywhere* brochure in Attachment 6 or at:

http://www.oclc.org/services/brochures/12121A_NL_AuthenticationOptions.pdf

- *Load MARC records* - We recommend that each library load the free OCLC MARC records into their local catalog. Our experience indicates that libraries that loaded records have experienced up to 300% increased usage. Our Implementation Specialist can assist in finding the best solution for MARC record delivery. Our recommendation is for MSL to create a webpage where all libraries can go to download the MARC records. We also recommend setting holdings in WorldCat to facilitate access to these titles from LiLI Unlimited, WorldCat on FirstSearch, Open WorldCat, and worldcat.org.
- *Promote eContent* - We recommend that each library use the free NetLibrary marketing kit to promote the eContent both inside and outside the library. The kit includes customizable posters, table tents, ad slicks, web banners, email announcements, press releases, and marketing ideas. Our Implementation Specialist can assist by providing each library with its own NetLibrary marketing kit as well as by facilitating a Marketing workshop to discuss marketing best practices.
- *Achieve personal success*. We recommend that library staff review the NetLibrary demo and available brochures to learn how to create an account, search for eContent, download eAudiobooks, and transfer eAudiobooks to an MP3 player. We encourage staffers who interact with patrons to practice checking out and downloading an eAudiobook as well as transfer one to an MP3 player when available. Our Implementation Specialist can assist by conducting Librarian training sessions to show how to use the service and how to teach patrons about the service.

2.4 Library issues

How are patrons authenticated?

NetLibrary supports three authentication methods. Some methods allow users to be authenticated automatically, while others require user input such as a library bar code. Most libraries use a combination of methods to provide access from inside and outside the library.

- *IP (Internet Protocol) Address Recognition.* Every computer connected to the Internet has an IP address (for example: 132.174.95.5). Your library can grant computers access to NetLibrary by specifying IP addresses, so anyone using those computers will be authenticated.
- *Secure Referring URL.* In this method, your library provides access to the collection only after the user has been identified as valid. Users are first prompted for information (such as a library bar code). Once the information is verified, the library links to NetLibrary, which recognizes the user is coming from the "referring URL," and authenticates the user.
- *Proxy Server.* Many libraries already use proxy servers to facilitate authentication. Users who want access to eContent will first be prompted for information (such as a library bar code) to be authenticated. Once the information is validated, the user will be able to access NetLibrary eContent.

Describe your technical support and system administration features.

OCLC's expert technical support is available Monday through Friday via toll-free telephone and email from 5:00 am to 7:00 p.m. MST.

The NetLibrary service's system administration features include access to the online Library Resource Center. Please see our earlier discussions of the LRC and Attachment 3.

How are catalog records delivered?

We recommend that MSL create a web page from which each of your libraries can download OCLC MARC records. We provide these records at no additional cost. Our Implementation Specialist will help you set up your web site to enable individual libraries to access and download OCLC MARC records.

What marketing tools do you provide?

To help MSL build awareness and expand use of your NetLibrary eAudiobook collection, we provide free promotional tools, including:

- *In-library Materials.* Posters, bookmarks, notepads, pens, etc.
- *Logos and Graphics.* Download the NetLibrary, OCLC and WorldCat logos for use in print and electronic communications.
- *Ad Slicks.* Customizable ads for promoting your eContent collection in campus or local media.
- *Public Relations.* A sample press release that can be customized for your library's collection.
- *Customizable Display Materials.* With our easy-to-use add-on templates, you can customize posters and table tents with your library information and print them on your office printer.
- *Web Banners and Buttons.* Promote your collection on your Web site, in electronic newsletters, or on your intranet.

Please see the example in Attachment 7 or at:

http://library.netlibrary.com/MarketingKits.aspx?ekmense1=20_submenu_44_link_1.

What kind of usage statistics are there, and how do we get them?

OCLC will send MSL usage statistics reports quarterly. These reports will include usage per library per month and will identify libraries that may need additional assistance to increase usage. We have performed similar analyses for other groups and understand the key factors that drive library usage.

In the sample usage report and analysis presented in Attachment 2, each library's population was identified to provide a common basis for comparison. The analysis compared usage for libraries that had and had not loaded MARC records. Usage statistics can also be analyzed relative to other factors, such as completion of training, establishing remote-patron authentication, and implementation of marketing activities.

NetLibrary usage statistics are also available online from our secure, subscribers-only web site. Reports are available at both the library and group level. Date ranges may be set as desired by the library staffer running the

report. The MSL NetLibrary Administrator will be able to access participants' statistics at both the group and individual library level. Each participating library's NetLibrary Administrator can access statistics only for his or her library.

2.5 Describe your pricing and invoicing model options for consortia.

Subscription Program is priced as an annual subscription. To quote Subscription Program pricing, NetLibrary will need the following statistic for each library in your group:

- Public Libraries: Most recent annual circulation
- Academic: Full-time equivalent (FTE) student enrollment
- School: Student enrollment
- Special Libraries: Number of full-time employees

Purchase Program pricing is the title's list price plus an annual access fee of 10% of the list price.

3.0 Terms and Conditions

3.1 The State of Montana will not become obligated as a result of this RFI.

3.2 Information submitted in response to this RFI will become the property of the State of Montana.

3.3 Information that is confidential or trade secret must be clearly marked and separated from the rest of the response. The response does not contain confidential material in the cost or price section. An affidavit from a Vendor's legal counsel attesting to and explaining the validity of the trade secret claim as set out in Title 30, chapter 14, part 4, MCA, is attached to each response containing trade secrets. Counsel must use the State of Montana "Affidavit for Trade Secret Confidentiality" form in requesting the trade secret claim. This affidavit form is available on the General Services Division's website at:
<http://www.mt.gov/doa/gsd/procurement/forms.asp> or by calling (406) 444-2575.

Any information separated out under this process will be available for review only by our strategic planning team, and limited other designees. Vendors must be prepared to pay all legal cost and fees associated with defending a claim for confidentiality in the event of a "right to know" (open records) request from another party.

The State of Montana will not pay for any information herein requested nor is it liable for any cost incurred by the vendor.

- 3.4 Economy of presentation: Special binders, colored displays, promotional materials, and the like are not required.
- 3.5 This RFI is being submitted strictly for the purpose of gaining knowledge of the products and services available.

4.0 RFI Response Instructions

- ✓ Brief description of past experience providing assistance in implementing e-content services.

OCLC's FirstSearch reference database service went online in 1991. Today 18,747 libraries throughout the world use FirstSearch's Web-based resources. Building on our 16 years of delivering online content, patrons of thousands of libraries around the world also enjoy the quality and convenience of OCLC NetLibrary's 140,000+ eBook titles and a growing catalog of over 4,700 eAudiobook titles. Our eAudiobook clients include *the State of Utah* for all Utah public libraries, *NC Live* for all North Carolina public and academic libraries, and *Califa* for public libraries in California. We have worked with these groups to offer and hone the training program and implementations services described in this RFI response.

- ✓ From your past experience, has the State identified all the major components necessary to complete this project? If not, please provide information on other necessary components.

We have found OCLC Implementation Services to be a key benefit in statewide NetLibrary roll-outs. Please see our list of Implementation Services activities in Section 2.3.

In addition to supporting roll-out, OCLC Implementation Services will continue to monitor and communicate your libraries' level of activity via the quarterly usage statistics report and analysis. This information will enable you to pinpoint opportunities for additional training and/or marketing efforts as well as to identify success stories for statewide recognition.

- ✓ Please provide a list of potential problems/risks that the State may encounter during this project. Please provide any ideas or suggestions about how such problems/risks should be addressed in a solicitation.

While working with similar large group and statewide NetLibrary clients in the past, the following are common risks and the solutions that we have implemented to mitigate those risks.

1. *Libraries not able to offer patrons a remote access method suffer low usage.* Our recommendation for any libraries without a remote patron authentication method would be to direct patrons to the Montana Library Network portal (<http://montanalibraries.org/>) for access to NetLibrary. Once patrons log in to the Montana Library Network portal and select the NetLibrary resource link, they can select their library jurisdiction or individual library name from a drop-down list. This will affiliate patrons with their correct library e-Content collection, and they can easily create their NetLibrary accounts remotely. To see examples of how other NetLibrary clients have implemented this approach, please see:
 - <http://www.nclive.org/authhome.phtml>
 - http://pioneer.utah.gov/audio_books/index.html

For information on other NetLibrary authentication methods, please see the *Access from Anywhere* brochure in Attachment 6 or at: http://www.oclc.org/services/brochures/12121A_NL_AuthenticationOptions.pdf

2. *Libraries that do not to load eAudiobook MARC records experience lower usage. When MARC records are not loaded, patrons cannot find the eContent when searching the library's OPAC.* We recommend that each library load the free OCLC MARC records into the local catalog. Statistics show the libraries that loaded records experienced up to 300% increased usage. Our recommendation is for MSL to create a webpage where all libraries can go to download their OCLC MARC records. We also recommend setting holdings in WorldCat to facilitate access to these titles from the Montana Library Network Catalog, WorldCat on FirstSearch, Open WorldCat, and worldcat.org.
3. *Libraries that choose not to promote the eAudiobook content on their website or in their library reduce patron awareness and experience lower usage.* We recommend that each library use the free NetLibrary marketing kit to promote eAudiobooks both inside and outside the library. The kit includes customizable posters, table tents, ad slicks, web banners, email announcements, press releases, and marketing ideas. Our

Implementation Specialist can assist by providing each library with its own NetLibrary marketing kit as well as by facilitating a Marketing workshop to discuss marketing best practices.

4. *Staff members lacking knowledge of how to use NetLibrary eAudiobooks are less likely to promote the service to their patrons.* We recommend that library staff review the NetLibrary demo and available brochures to learn how to create an account, search for eContent, download an eAudiobook, and transfer eAudiobooks to an MP3 player. We encourage Patron Services staff to practice checking out and downloading an eAudiobook as well as transfer one to an MP3 player when available. Our Implementation Specialist can conduct Librarian training sessions on how to use the service and how to teach patrons about the service.

- ✓ Your best estimated time frame for implementing and completing the project.

Creating and setting up accounts. Depending on the number of participating libraries, we will need 30 days to create the accounts. If fewer than 100 accounts are involved, we can complete set-up in 1 week.

Training & implementation. We will work closely with MSL and participating libraries to plan and complete training and implementation as we have done in Utah and North Carolina and have proposed in Idaho. For similar statewide implementations, we have typically conducted the first round of training, established an authentication method, and made MARC records available within the first month of the project. Review and analysis of the usage data is done periodically over the first year of the project.

- ✓ Attach licensing agreement requirements.

Please see our licensing-agreement documents in Attachment 8.